

A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova School of Business and Economics.

Can affirming Ultra Suave as the most natural brand in the mass market make it the market leader in Portugal?

Report C: What can Ultra Suave do in order to succeed in the natural products driven consumer segment vs. niche natural brands?

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1. Introduction

Ultra Suave is inserted in the natural segment, which currently makes up 30% of the total Portuguese hair care market. Despite a slight fall of 1.4% registered in the first quarter of this atypical year, the expectations are that this market will increasingly get importance over the years, as consumers are getting worried about their health and reflecting it not only through what they eat.

The *natural products driven consumers* are the main motivator segment of consumers for this increase since they are engaged, influenced and concerned about the ingredients used on hair care products' composition, that also always try to make the most conscious choices concerning products' packages.

Within all Ultra Suave's competitors and brands considered by the *natural products driven segment*, this individual work question is focused on the niche natural brands: those that have recently entered the natural segment of the market, targeting a specific group of consumers and which products mostly contain ingredients from natural origins. These brands include: **Aussie** with 0.5% MS that is a brand inspired in Australia, created in 1980 and acquired by Procter & Gamble in 2003. Its main goal is to create solutions with powerful Australian botanicals to protect and restore "hair that's had too much fun" in the hot sun and salty sea (Aussie Hair, 2020). After an unsuccessful entry in the Portuguese hair care market in 2011, Aussie returned to be available at Continente hyper and supermarkets in 2018.

Love Beauty and Planet with 0.1% MS, is a vegan brand founded in 2015 by Unilever. The brand's core goal is providing good beauty results while caring for and loving the planet. Its products are mainly based on natural and organic ingredients. The brand classifies an ingredient to have 'natural origins' if its natural condition has not suffered any change (Love Beauty and Planet, 2020). The brand is offered at the Portuguese hyper and supermarkets (Continente, Pingo Doce and Auchan), since 2019.

Maui Moisture with 0.2% MS, a vegan hair care brand, founded in 2017 by Johnson & Johnson, and inspired in Hawaiian natural and tropical ingredients. It distinguishes itself from other brands due to its unique blend, since the first ingredient that composes its products is 100% aloe vera, rather than demineralized and chemically treated water, which is the first ingredient of any ordinary hair care product (Johnson & Johnson, 2017). The brand has been available in Portugal at Continente, since the second semester of this present year of 2020.

Lastly, **Ogx** with 0.8% MS, is a brand that was released in 2006 by an American who considered that there to be few high-quality hair care solutions available for everyone (Forbes, 2017). In 2016, Johnson & Johnson acquired Ogx, a brand that uniquely approaches beauty since it desires to help people understand what they like in their hair and offer solutions to make them like it even more, instead of fixing people's hair (Ogx, 2020). Ogx is sold at Portuguese supermarkets (Continente and Auchan), since 2018.

Beology was excluded from this analysis since no insights were obtained on this brand from the quantitative and qualitative research, beyond being the only brand that revealed a decrease in market share in the last years.

Having this in mind and considering that the niche natural brands will occupy a progressively stronger position in the natural segment of the hair care market, it is important to understand both the brand's points of differentiation (POD) that make them be perceived as natural by its consumers, as well as the points of parity (POP) between them, to consequently understand **what can Ultra Suave do in order to better succeed in the *natural products driven consumer segment* than niche natural brands.**

2. Addressing the individual work question

2.1. *Natural products driven consumers*

This profile is characterized by engaged consumers with the hair care category: firstly, they are worried and highly influenced by what ingredients a product is composed by, as they believe

those affect their health and secondly influenced by online recommendations received either from reviews or blogs. Lastly, promotions ongoing and price-quality ratio may also influence their choices.

Beyond it, consumers that specifically buy niche natural brands, assign importance to the products that show the percentage of natural ingredients, and to those that do not contain sulphates, parabens, and other ingredients that they consider being harmful. Furthermore, vegan and cruelty-free products are also important factors, although not yet determining for every consumer.

Concerning packaging, niche natural brand users try, at least, to make the most conscious choice by considering packages made of recycled plastic, recyclable plastic, or plastic-free packages. According to the insights gathered through the in-store observations, it was realized that shoppers of niche natural brands tend to notice them mainly when they are on promotion but, generally, these brands are purchased by people who go directly to a specific product, indicating that they already knew it.

2.2. Points of parity and differentiation between Ultra Suave and niche natural brands

There are two major differences between Ultra Suave and all the niche natural brands: 1. Ultra Suave is the most competitive brand in terms of product's prices (Appendix 1) and discounts applicable since it goes up to 40%, whilst the discounts of niche natural brands only reach values of 25%; 2. The information provided on niche natural brands' packages is mainly provided in English, whereas Ultra Suave's is in Portuguese.

The analysis of the remaining points of parity (POP) and points of differentiation (POD) was conducted between Ultra Suave and each niche natural brand, which is visible in the following tables.

2.2.1. Aussie

Table 1: Main points of parity and differentiation between Aussie and Ultra Suave

	Aussie' POD	Aussie and Ultra Suave's POP	Ultra Suave's POD
Products and Lines	<p><u>Lines</u>: The 3 Minute Miracle Repair and Moisture, is a range of products known for its miraculous results of re-energising, revitalising, and restoring the hair in only 3 minutes (Aussie – Aussie Products, 2020).</p>	<p><u>Products</u>: Shampoo, conditioner, and hair oil.</p> <p><u>Lines</u>: Products for damaged, frizzy, and thicker hair.</p>	<p><u>Products</u>: Mask, leave-in conditioner, heat protect spray, dry shampoo and solid shampoo.</p> <p><u>Lines</u>: Products for dry, blonde, oily, delicate and children hair.</p>
Naturality	<p>All products are cruelty-free certified by PETA.</p> <p><u>Products' composition</u>: Colourant-free, made of 80% purifying water, all including an Australian ingredient.</p>	<p><u>Products' composition</u>: Parabens and sulphates-free, both have some lines that are silicon-free and all contain at least one ingredient from natural origin.</p>	<p>Some products' lines are vegan.</p> <p><u>Products' composition</u>: A line of products made of 98% ingredients from natural origins.</p>
Sustainability	<p><u>Production</u>: Uses exclusively green electricity (generated from renewable sources), sends zero manufacturing waste to landfill and is 35% water efficient (Aussie – Our Story, 2020).</p> <p><u>Sourcing</u>: Ingredients are sourced from a local farm that follows traditional methods such as hand harvesting and pesticides-free (Aussie – Our Story, 2020).</p>	<p><u>Packaging</u>: Partly made of recycled plastic and completely recyclable if this is done correctly.</p> <p><u>Sourcing</u>: The origin of the product's main ingredients is transparently revealed.</p>	<p><u>Formula</u>: All products reach an average of 91% biodegradability (Garnier – Green Beauty, 2020).</p> <p><u>Sourcing</u>: Commitments to Solidary Sourcing to provide farmers ethical conditions of work (Garnier – Green Beauty, 2020).</p>
Communication	<p><u>Packaging</u>: Includes very few information.</p> <p><u>Website includes</u>: 1. A timeline of whole brand's history; 2. A section to explain why products must contain some non-natural ingredients and which are those, denysifying the use of sulphates on products; 3. Products' ratings and reviews.</p> <p><u>Instagram</u>: Brand's dedicated account which content recalls the brand's identity around Australia.</p>	<p><u>Packaging</u>: Exactly same type of information provided at the front.</p> <p><u>Websites include</u>: 1. A section to describe product's main ingredient and its benefits; 2. A part dedicated to providing tips for all types of hair or desired goals.</p> <p><u>Instagram</u>: Both have content around the specifics and reviews of products.</p>	<p><u>Packaging</u>: Disposes more detailed information concerning products' ingredients and production.</p> <p><u>Website includes</u>: A section dedicated to brand's commitments towards sustainability.</p> <p><u>Instagram</u>: The account is shared with other brands that belong to Garnier.</p>

2.2.2. Love Beauty and Planet

Table 2: Main points of parity and differentiation between Love Beauty and Planet and Ultra

Suave

	Love Beauty and Planet's POD	Love Beauty and Planet and Ultra Suave's POP	Ultra Suave's POD
Products and Lines	<p>Lines: The Blooming Colour for coloured hair and The Happy and Hydrated made for curly hair (Love Beauty and Planet – Hair, 2020).</p>	<p>Products: Shampoo, conditioner, and mask.</p> <p>Lines: For damaged, dry, and weak hair.</p>	<p>Products: Oil, leave-in conditioner, heat protect spray, dry shampoo and solid shampoo.</p> <p>Lines: For blonde, oily, delicate, frizzy, thicker and children hair.</p>
Naturality	<p>All brand's products are cruelty-free and 100% vegan, certified by PETA and Vegan Action, respectively.</p> <p>Ingredients: All products are colourant-free and the shampoos and conditioners are silicone-free. Every formula is created based on organic natural ingredients (Love Beauty and Planet – Origen Natural, 2020).</p> <p>Products' composition: Shampoos are made of 92% natural origin ingredients, conditioners 97% and masks 98%.</p>	<p>Products' composition: Both have paraben-free products, lines made of 98% of ingredients from natural origins, and all products contain at least one ingredient from natural origin.</p>	<p>Products' composition: All products are sulphates-free.</p>
Sustainability	<p>Packaging: 100% made from recycled materials.</p> <p>Production: All stages of its value chain are carefully evaluated. The brand created a carbon tax for each tone produced evaluated (Love Beauty and Planet – Consciência Ambiental, 2020)</p> <p>Formula: 99% biodegradable.</p>	<p>Sourcing: The origin of the product's main ingredients is transparently revealed and ethically sourced from sustainable origins.</p>	<p>Formula: All products reach an average of 91% biodegradability (Garnier – Green Beauty, 2020).</p> <p>Packaging: Bottles are partly made of recycled plastic and completely recyclable if this is done correctly (Garnier – Green Beauty, 2020).</p>

Table 3: Main points of parity and differentiation between Love Beauty and Planet and Ultra

Suave

	Love Beauty and Planet's POD	Love Beauty and Planet and Ultra Suave's POP	Ultra Suave's POD
Communication	<p>Packaging: 1. Vegan symbol and percentage of ingredients from natural origins showed; 2. The bottle is covered with pictures of the natural ingredients it contains with relief; 3. Contains a list of the brands' benefits (Appendix 2); 4. Brand's commitments with beauty and the planet described.</p> <p>Website includes: 1. The full list of ingredients that products contain; 2. Natural ingredients harvesting process is described (Love Beauty and Planet – História das Fragrâncias, 2020).</p> <p>Instagram: Portuguese brand's account with no content since 2019, that is shared and tagged mainly by sustainability and vegan advocates.</p> <p>TikTok: In 2020, was launched a viral challenge in partnership with Ellen DeGeneres, where it was possible to win 25k dollars by making a creative video throwing a recyclable package into a bin.</p>	<p>Packaging: 1. Provides information about which type of hair the product is for; 2. A line of Ultra Suave shows the percentage of ingredients from natural origins as it happens in all Love Beauty and Planet's bottles.</p> <p>Website: Both websites are fully dedicated to Portuguese consumers and contain: 1. A detailed description of the products' main ingredient and its benefits; 2. Instructions on how to properly use their products.</p>	<p>Packaging: Disposes more detailed information concerning products' ingredients and production.</p> <p>Website: There is part dedicated to providing tips for all types of hair or desired goals.</p> <p>Instagram: The account is shared with other brands that belong to Garnier.</p>

2.2.3. Maui Moisture

Table 4: Main points of parity and differentiation between Maui Moisture and Ultra Suave

	Maui Moisture's POD	Maui Moisture and Ultra Suave's POP	Ultra Suave's POD
Products and Lines	<u>Lines</u> : The Agave made for coloured hair and the Coconut Oil for curly hair (Maui Moisture – Collections, 2020).	<u>Products</u> : Shampoo, conditioner, mask, hair oil, and leave-in conditioner. <u>Lines</u> : For damaged, dry, and weak hair.	<u>Products</u> : Heat protect spray, dry shampoo and solid shampoo. <u>Lines</u> : For blonde, oily, delicate, frizzy and children hair.
Naturality	All brand's products are cruelty-free and vegan. <u>Products' composition</u> : Colourant, mineral oils, synthetic dyes, gluten and silicone-free, based on 100% aloe vera as the first ingredient, pure coconut water, and tropical natural ingredients (Maui Moisture – About Us, 2020).	<u>Products' composition</u> : Both have paraben and sulphates-free products and all contain at least one ingredient from natural origin.	<u>Products' composition</u> : A line of products made of 98% ingredients from natural origins.
Sustainability	<u>Packaging</u> : Eco-friendly as it is post-consumer recyclable.	<u>Sourcing</u> : The origin of the product's main ingredients is transparently revealed. <u>Packaging</u> : All bottles are partly made of recycled plastic and post-consumer recyclable.	<u>Formula</u> : All products reach an average of 91% biodegradability (Garnier – Green Beauty, 2020). <u>Sourcing</u> : Commitments to Solidary Sourcing to provide farmers ethical conditions of work.
Communication	<u>Packaging</u> : 1. Contains a list of the brands' benefits (Appendix 3); 2. Shows the vegan and cruelty-free symbol; 3. The shape and colour remind fruit smoothies. <u>Website includes</u> : 1. The full list of product's ingredients; 2. Reviews and Q&A on products; 3. A Curl Squad: helps girls finding the perfect products for their curls. <u>Instagram</u> : Portuguese brand's account with very frequent content that uses influencers that have curly hair or follow a healthy lifestyle.	<u>Websites include</u> : 1. A detailed description of the products' main ingredient, its benefits and history; 2. Instructions on how to use products properly; 3. A part dedicated to providing tips for all types of hair or desired goals.	<u>Website</u> : There is part dedicated to the Green Beauty and brand's commitments towards sustainability. <u>Instagram</u> : The account is shared with other brands that belong to Garnier and influencers used to promote the brand are mainly musicians and actresses which families are recognized by consumers.

2.3.4. Ogx

Table 4: Main points of parity and differentiation between Ogx and Ultra Suave

	Ogx's POD	Ogx and Ultra Suave's POP	Ultra Suave's POD
Products and Lines	<p>Lines: The brand offers products focused on hair needs, goals, or states of mind, such as to fuller, recue, deep cleaning, and protect coloured hair rather than the type of hair. (Ogx – About Us, 2020).</p>	<p>Products: Shampoo, conditioner, mask, hair oil leave-in conditioner, heat protect spray, and dry shampoo.</p> <p>Lines: products for damaged, dry, and weak hair.</p>	<p>Products: Solid shampoo.</p> <p>Lines: Products for blonde, oily, delicate, frizzy and children hair.</p>
Naturality	<p>Products' composition: All products are sulphates-free and some gluten-free. Formulae are based on active and original ingredients, such as keratin, biotin, collagen or charcoal.</p>	<p>Products' composition: Both have paraben-free products.</p>	<p>Some products are cruelty-free and vegan.</p> <p>Products' composition: A line of products made of 98% ingredients from natural origins and all include at least a natural ingredient.</p>
Sustainability	<p>Packages: 100% eco-friendly, manufactured with materials containing recycled post-consumer resin (Ogx – FAQs, 2020).</p>		<p>Formula: Products reach an average of 91% biodegradability.</p> <p>Sourcing: Commitments to Solidary Sourcing to provide farmers ethical conditions of work.</p> <p>Packaging: Bottles are partly made of recycled plastic.</p>
Communication	<p>Packaging: 1. Brand's products have an oval shape and travel sizes products.</p> <p>Website contains: 1. A full list of all products' ingredients; 2. Detailed reviews and Q&A on products.</p> <p>Instagram: Portuguese brand's account with very informative content that intensively uses influencers to promote it, such as Bárbara Corby and Gloria Dias.</p>	<p>Packaging: 1. The main ingredient is highlighted at the front; 2. An extensive description of it is provided at the back; 3. includes instructions on how to use them properly.</p> <p>Websites include: 1. A detailed description of the products' main ingredient, its benefits and history; 2. A section dedicated to providing tips for all types of hair and desired goals.</p>	<p>Packaging: 1. Shows images of the main product's natural ingredient; 2. Disposes more detailed information concerning products' ingredients sourcing.</p> <p>Website: There is part dedicated to brand's commitments towards sustainability.</p> <p>Instagram: The account is shared with other Garnier's brands and influencers used to promote it are mainly musicians and actresses.</p>

2.3. How consumers are perceiving niche natural brands

The insights about niche natural brands' perceptions were gathered from the conducted in-depth interviews and from the quantitative research. The quantitative numbers used for the following analysis belong to the participants that knew or had bought a product from a niche natural brand and that were inserted in the *natural products driven consumer segment*. The quotations referring to the in-depth interviews follow the format: (Occupation, age, brand recently bought).

2.3.1. Aussie

Aussie is strongly connected to Australia due to its packaging with kangaroos that is known by 5 of the 11 respondents. It is not immediately recognized as being a brand composed of natural ingredients (by 7/11 respondents) and it is acknowledged as somehow answering all hair requirements, with 6/11 respondents acknowledging it.

The brand is mainly known by consumers from peer and online recommendations (5/11 participants) as, in general, brand's users, despite considering the brand to be slightly expensive, are satisfied with the results, hence recommend it to others (6/11). Even people that never experimented the brand before easily recognize it, however, it is frequently forgotten by shoppers, since they consider it to be quite hidden in supermarkets' shelves: "*Brand's products are hidden in the supermarket.*" (Lawyer, 25, Herbal Essences).

2.3.2. Love Beauty and Planet

The brand is perceived as being very natural and sustainable (by 6 of the 8 respondents) since it clearly communicates that on the front of its packages: through visual displays of products' percentages of natural ingredients, vegan certification, and by specifying the harmful ingredients that are not present in its products. It is recognized as having products for all types of hair but also responding to some specific needs, such as coloured hair (by 6/8 participants). Love Beauty and Planet is highly recommended by its users, as most have received positive feedback on the brand (by 5/8 respondents). The main reason for this is that the brand is considered it to leave the hair with the desired results and is consequently worth the charged

price (by 6/8 respondents). Nevertheless, some believe it to be easy to swap to other natural brands for being too expensive: *“I am able to use it for a whole day and by the end of the day my hair still smells amazing. It is also extremely sustainable. However, it is expensive so I would easily change to another one.”* (Teacher Assistant, 27, Love Beauty and Planet). The brand is known for having a pleasant fragrance and a good texture by 7/8 respondents.

2.3.3. Maui Moisture

Maui Moisture is perceived as a top-quality brand, whose products are considered very natural by all 7 participants. Despite being considered very expensive by 5 of the 7 respondents, users are willing to spend money on it, because they consider it to be one of the fewest natural brands in Portugal: *“The brand has a lot of quality, and is one of the few natural brands in Portugal.”* (Student, 25, Fructis).

The brand has been known only recently from online and friend’s recommendations, with 4/7 participants recalling receiving recommendations. The majority of participants (5/7) distinguishes the brand’s Instagram content for being very appealing, as well as its packaging.

2.3.4. Ogx

All 6 participants recognized that Ogx is a natural brand that offers high-quality products. However, half of the respondents (3/6) feel that products are very expensive and that there are other alternative brands equally as good, for a more affordable price: *“I really liked the brand, but there are more solutions equally as good and natural.”* (Human Resources Manager, 29, Ultra Suave).

Consumers have gotten to know the brand more recently mainly through peers’ recommendations, with all 6 participants affirming it. Also, all of them acknowledged Ogx as being very modern brand that offers desirable and captivating packages which, in fact, is one of the reasons that motivated them to try the brand’s products.

2.4. Implications for Ultra Suave

The challenge of affirming Ultra Suave as the most natural brand in the mass market is huge:

1 – *natural products driven consumers* are highly engaged with the hair care market and very informed about its brands, so most of them know that Ultra Suave belongs to L'Oréal, that is the most sold hair care brand in China, and for that reason a brand that tests on animals.

2 – *natural products driven consumers*, specifically the niche natural brands users see these brands as being very strong and consistent in terms of natural ingredients and sustainable packages, which makes harder for Ultra Suave to be perceived as the most natural brand in the Portuguese mass market. Despite niche natural brands being still marking their position in the Portuguese hair care market, they are expected to rapidly grow and gain market share. In other countries, these brands hold a powerful position as natural and sustainable brands, which is likely to happen in Portugal as well, in the long term.

Even so, Ultra Suave has exclusive POD on its side that can help it achieve the goal: 1. It is a brand totally communicated in Portuguese; 2. It practices the most competitive prices.

After analysing the points of differentiation and parity between the niche natural brands and Ultra Suave, it is possible to conclude that Ultra Suave can reach niche natural brands' consumers. The brand can achieve that by acting on the most important niche natural brands' points of differentiation where Ultra Suave is not yet competing, but also by creating points of differentiation exclusive to Ultra Suave to stand out itself in the natural segment of the hair care market, and consequently affirming itself as the most natural brand.

To cover the points of differentiation common to all niche natural brands, Ultra Suave should:

1. Launch a **line for coloured hair** since it is the only brand belonging to the natural segment that does not have products for coloured hair. Besides, Portugal is where the sale of products for colouring hair is growing the most, especially after the confinement (Dinheiro Vivo, 2020).

2. Make small **changes to its packaging** to be aligned with the most niche natural brands by showing the percentage of ingredients from natural origins the product contains and include a list of the positive aspects of the product or brand as Love Beauty and Planet and Maui Moisture do. Moreover, the brand should display the certification symbol of cruelty-free and veganism on products that are so, since this is highly valued by the *natural products driven consumers*.
3. Proceed to some modifications on its **website**, firstly concerning **ingredient's transparency** that should be included by providing the full list of products' ingredients, as it happens in all the other niche natural brand's websites. Secondly, Ultra Suave should invest in having more accurate and useful **ratings** and **reviews** on products, which niche natural brands already do, as *natural products driven consumers* are engaged consumers and influenced by online recommendations.
4. Create an **exclusive and independent Instagram** account of Ultra Suave, where brands' natural identity and products can be reinforced and communicated through influencers which lifestyle reflects the image that Ultra Suave intends to portray.

To be highlighted in the mass market as a natural brand, Ultra Suave should:

1. Trace the **path since the beginning** of its existence since Ultra Suave's products foundation is around nature and it is the first hair care brand with all the range of products made with recycled plastic (excluding the lid). Moreover, it is a daughter brand of Garnier, the world leader in Green Beauty, which products' strength comes from nature, advocating, at the same time for sustainable beauty. Ultra Suave should make its consistency on being a natural and sustainable brand clear, stating that its products reach values of 91% biodegradability. If this is properly **communicated**, mostly through its website, Instagram, and packaging, consumer's perceptions on Ultra Suave are expected to change.

2. Communicate the advantages of **waterless products** (leave-in conditioner, oil, dry shampoo) as they do not demand water to be applied on the hair, thus saving large quantities of water. Ultra Suave and Ogx are the only natural brands offering these products in Portugal, with Ultra Suave having the strength of offering these products at better competitive prices.
3. Make small **changes to its packaging** that will help the brand to visually portray a more natural image: 1. Cover all the transparent part of the packaging with **images of the main natural ingredients** the products contain, instead of disposing it only at the front; 2. **Highlight** in green the **natural ingredients** of the list or mark them with an asterisk and make a subtitle explaining that it corresponds to ingredients from natural origins.
4. Continue **investing** in providing more **environmental-friendly solutions**. Ultra Suave's solid shampoo launch was already a big step. Even so, the brand should bet on green packaging solutions, such as refill systems (announced as well by Procter & Gamble, that acquires Aussie, that will be launched in 2021) and packages made of other green materials that imply less usage of plastic.
5. Create a Portuguese **TikTok account** for Ultra Suave to increase brand awareness through videos and challenges, promoting actions towards sustainability and "naturalness".

3. Limitations

Two main limitations arose throughout the progress of this individual work question. Firstly, niche natural brands, despite being growing, still represent little MS and thus, it was difficult to find niche natural brands' users. For this reason, the perceptions on these brands gathered were based on a reduced number of consumers which made it less accurate. Secondly, the brands Aussie and Maui Moisture do not have a Portuguese website, whereby information on the brand's lines available in Portugal was checked in supermarkets' websites and through in-store observations. Hence, there might be some details that are not entirely precise.

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